

Virtual User Group: Governance in Financial Services

Tuesday, March 30, 2021

Speaker



Jaimeson Wennerstrum

Principal Customer Success Manager

Agenda

- 11:00 a.m. Welcome and Agenda (5 min)
- 11:05 a.m. Customer Spotlight: Great Southern Bank (20 min)
Leigh Hasty, Senior Project Manager
- 11:25 a.m. Group Discussion (20 min)
- 11:45 a.m. Customer Spotlight: Charles Schwab (20 min)
*Tracy Springer, Sr. Team Manager, Marketing Operations
Process & Platforms*
- 12:05 p.m. Group Discussion (20 min)
- 12:25 p.m. Wrap-up Next Steps (5 min)
- 12:30 p.m. Event Ends



PRESENTER



Leigh Hasty

Senior Project Manager
Great Southern Bank





Understanding what really matters.



[GreatSouthernBank.com](https://www.GreatSouthernBank.com)



Workfront at Great Southern Bank

Who we are

How we use Workfront in our organization

Governance Charter

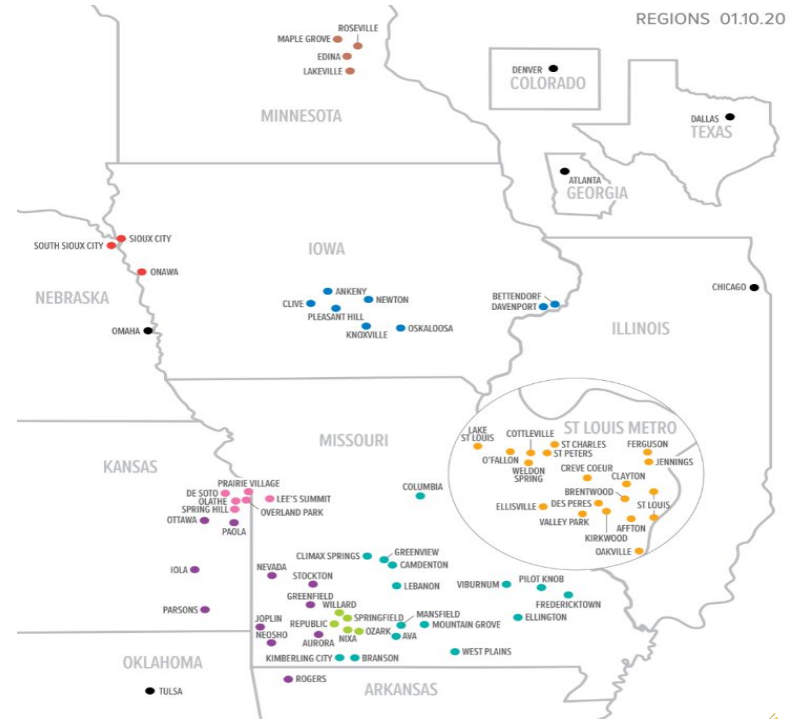
Data Security - Documentation

Monthly Newsletter



Who we are

- \$5.5 billion in assets
- In 11 states, 5 of which have loan production offices only
- Expanded exponentially in 2009 with FDIC-assisted bank acquisitions
- Approximately 1200 associates
- Project structure
 - No formal PMO
 - Enterprise Projects Department with project managers and business analysts



How We Use Workfront

- Currently 95 Workfront users across multiple departments
 - Marketing, Enterprise Projects, Compliance, IT/IS, Training, Loan Operations Managers
- Each major group has their own group administrator, 3 system admins
 - This allows each group to customize their own instance and communicate
 - Only system admin allowed to delete projects
- Each team uses Workfront their own way
 - Uniformity is not pushed unless people are involved in a project managed by Enterprise Projects

Governance Key Topics

Workfront Governance Charter	
Purpose	Governance is the key driver in overseeing the process of understanding of information across the Workfront based decision-making and informed action to improve the organization.
Scope	The committee will undertake a management role to achieve the goals of the organization.
Responsibilities	As a strategic, cross-functional decision-making committee: <ul style="list-style-type: none">• Oversight and Decision-Making: Act as a central authority for all system and group administrators.• Implementation: Be accountable for the on-time delivery of system and group changes.• Data-Driven Culture: Instill and promote an organization-wide culture of making positive change through continuous improvement.• Conduct an annual review of under-utilized resources.• Conduct a monthly review of documentation.
Goals	<ol style="list-style-type: none">1. Strive to improve data quality and processes.2. Establish a systematic approach to governance.3. Ensure that relevant stakeholders are kept informed and engaged in their departments.4. Drive organizational and behavioral change.5. Provide stakeholders with guidance, standards, and best practices.
Membership	All system and group administrators.
Attendance Participation	<ul style="list-style-type: none">• Members will attend all meetings unless they have a conflict.• Ad-hoc attendees may be requested in order to address specific issues.• Quorum will consist of 75% of the members present.• Decisions will be based on majority.
Authority	<ul style="list-style-type: none">• Authority lies with the committee itself and not with any individual member.• The committee has the authority to approve or disapprove all system and group changes.• The committee does not have the authority to implement changes.
Frequency Nature of Meetings	<ul style="list-style-type: none">• The committee will meet quarterly, scheduled in advance.• Meetings will be conducted in-person and/or via video conference.• The agenda of the meetings will include system and group changes, trouble-shooting, and other relevant topics.• If there are no agenda items, the meeting may be cancelled.
Guiding the Committee	<ul style="list-style-type: none">• The meeting will be led by one of the system administrators.• An agenda will be sent out prior to the meeting.• Responsibility for action items will be delegated to the appropriate stakeholders.

- Authority
- Data Security
- System Changes
- Frequency of meetings
- Meeting Agenda/Attendees
- Instance Cleanup
- Currently on version 3

Documentation in Workfront

Weekly Document Upload Report
This is a weekly report of documents added to projects. This is to be reviewed by system admins and ITRM to make sure no sensitive information is uploaded to Workfront.

Details

Download all Export ▾

View Icons Name Source

- > Home Group: Training (4)
- > Home Group: Enterprise Projects (24)
- > Home Group: Treasury Operations (2)
- > Home Group: Enterprise Solutions (5)



Set Filter Rules for your Report

Only show me Documents in which the...

Current Version >> Entry Date Between ▾ \$\$TODAYb-1w 📅 \$\$TODAYe-1w 📅 ✕



GREAT SOUTHERN BANK

MONTHLY WORKFRONT NEWSLETTER

- Q&A
- Tips & Tricks
- System Changes
- Release Highlights
- Some type of helpful visual or some type of practice exercise



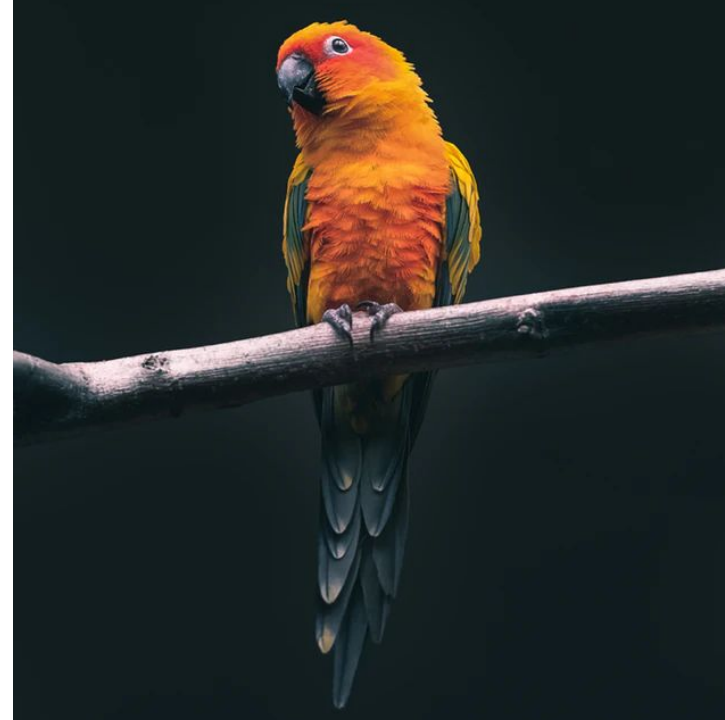


Questions?

“Birds of a Feather” Group Discussions

Go around the room and share:

- Where does your organization have the most opportunity to improve in terms of governance in Workfront?
- If governance is well-established at your organization, what advice would you give someone standing up a new model?



PRESENTER



Tracy Springer

Sr. Team Manager, Marketing Operations
Process & Platforms



Workfront Governance at Charles Schwab

The Charles Schwab logo consists of a blue square containing the word "charles" in a white, lowercase, serif font, and the word "SCHWAB" in a white, uppercase, sans-serif font directly below it.

charles
SCHWAB

Own your tomorrow.

Instance

A summary...

highlights
usage
adoption

A bit about Workfront at Schwab

Customer since
March '14 with
original roll-out in
Creative Center

Single instance,
single company,
many users and
groups

Platform ownership
and administration in
Marketing (buss. &
IT)

distributed group
administration for
enterprise

Integrations with
Workato, Jira,
WORM-archival

Users by the Numbers

Users & Groups

3.8k active users

78 parent / 230
total groups

Admins

62 Group Admins
2 Sys Admins

Licenses

82% Plan
17% Work/Review
3% Request

Logins

3.2k year
2.5k quarter
1.8K month
645 yesterday

Groups' primary functional adoption

Request : 60%

3k avg annual

226k total

Projects: 65%

13.5k avg annual

108k total

*Request to project: 15% groups
33%/36k of total projects

Organize & Visualize:
60%

Dashboards 860

Reports 5k

Layout Templates 150

Custom Data: 75%

Forms 816

Fields 11.6k total

Popular Workflow Themes

1

Asset Development & Review

2

Event Planning & Management

3

Risk Procedures

4

Business Planning

5

Operations

Governance

Where...

we started

we're at

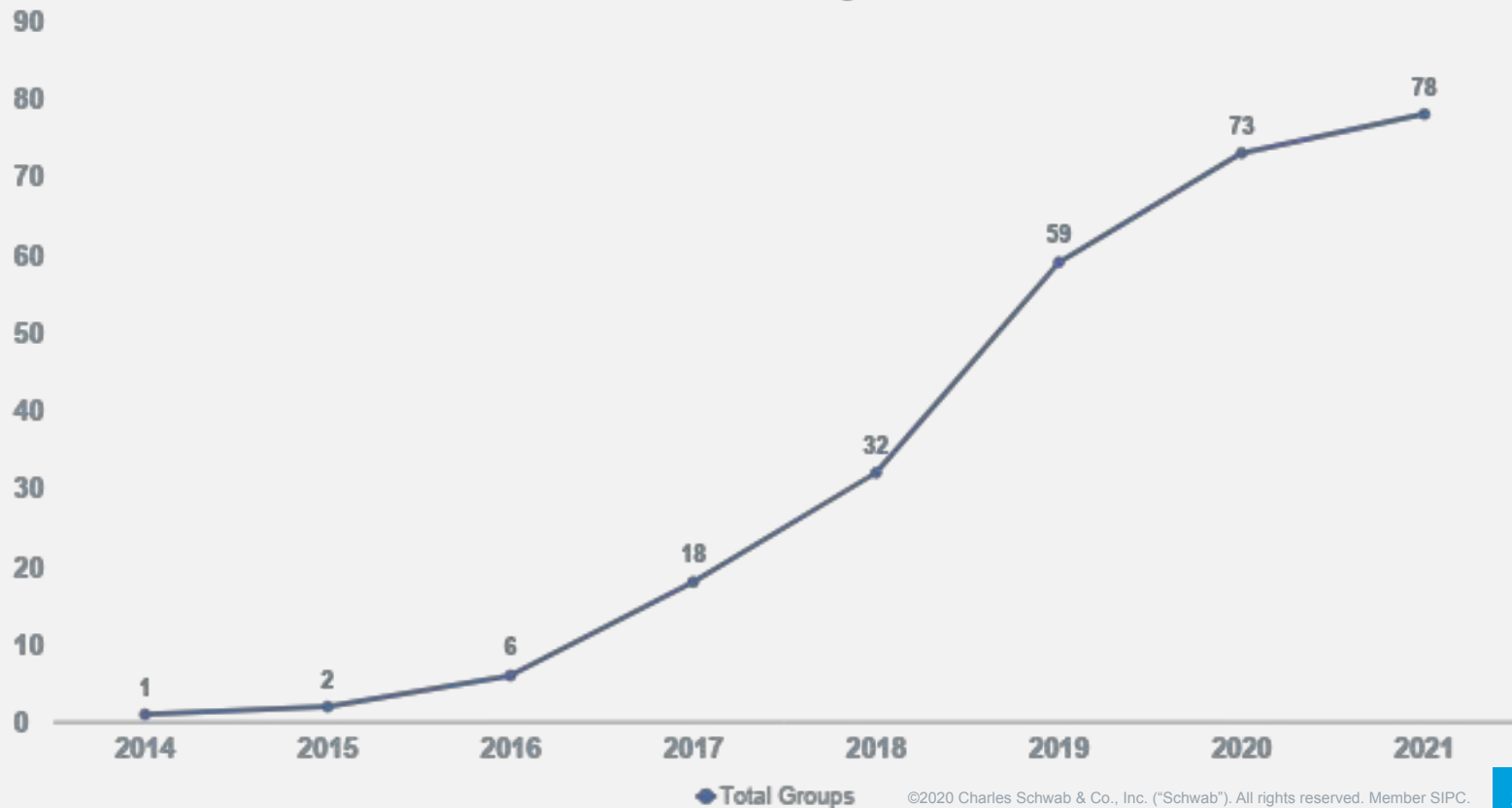
we are going



Group Growth YoY

Parent-groups only

Schwab Workfront Groups - YoY Parent-only



Ownership & Governance Evolution

Business Unit: Creative Center

Business unit-specific process rollout (~200 hundred users)

Adhoc support within volunteer Ops and core functional teams

Governance not a thing yet!

Organization: Marketing

Rollout of Mktg-Compliance process (~1.5k users)

New Mktg Ops team of three

Design and Support by 1 FTE

CC retained Sys Admin

Governance not a thing yet!

*Marketing & the Enterprise

Organic interest = YoY Growth

Design & Support by 2 FTEs

Groups must have designated administrator

Automation & Integrations

Governance: onboarding, consulting, monthly meeting

Centralized Enterprise

Enterprise Team

Scale with purpose and prioritize (onboard, optimize, integrate)

Design best practices and standards

End-user support

Governance policies: data, archival, permissions, hierarchy

Distributed Responsibility Agreement

Marketing; Enterprise Owner

“The Marketing Operations team manages Workfront Governance via core group collaboration, system settings, troubleshooting escalated issues, weekly admin office hours, vendor management, and administrator onboarding, vendor management, and business resources for platform projects.”

Group Administrators

“...non-Marketing groups will designate an administrator in their organization, responsible for: all facets of process development, maintenance, and support; data management and archival; end user management, support, and training.

The Group Administrator(s) are responsible for ensuring proper permissions are in place for all of the group's users and objects.”

Future Centralization

Scale

- Strategic identification / prioritization of new groups/processes
- Ongoing value assessment of existing workflows
- Speed to ramp up
- Speed to new launch
- Speed to integration and automation

Focus

- Resources to evaluate and maintain platform tidiness
- Speed of projects that benefit all groups/functionality
- Expanding commonly used platform integrations
- One stop end-user support for all workflows

User Experience

- Simplification of layout
- Cross-group user setup/layout
- Consistent workflow architecture and interaction patterns
- Guided process navigation for most workflows
- Workfront hub and resources on intranet

Policies

- Platform suitability/ToA
- Data access, hygiene, and archival
- Workflow and org design standards
- Certification for group admins
- Generalized authorized use cases for automation
- Audited/processes subject to evaluated by Compliance & Legal

Thank you!

charles
SCHWAB

Own your tomorrow.



Wrap-up and Next Steps

Continue the Conversation on Workfront One

- Collaborate with others in a similar industry or department
- Harness the power of your peers to crowdsource inspiration and solutions
- Learn about upcoming events

The screenshot shows the Workfront ONE website homepage. At the top, there is a search bar and a navigation menu with links for Home, Getting Started, Resources, New Workfront Experience, Collaboration, Events, Support, My Experience, and Call Customer Support: 844-306-4357. A welcome message reads: "Welcome Workfront Customers and Partners! Explore the tabs below to: check out our featured content to help you do your best work, find what's popular with other users, read the latest news, and find out what this site is all about." Below this is a large image of a group of people in a meeting. The main content area is divided into four featured sections: "Take advantage of Virtual Leap" (with a "Register today" button), "The new Workfront experience" (with a "Learn more" button), "Join the Community" (with a "See the latest discussions" button), and "Network with Workfront Users" (with a "See all 8 topics" button). At the bottom, there is a "Community Discussions" section with a "Question" tab selected, a search bar, and a "Sort by" dropdown set to "Latest Posts". A discussion titled "For the Love of Pets" by Workboldy - Kristin Farwell is visible, dated June 8, 2020 at 7:50 AM. To the right of the discussions is a "Product updates" section with links for "What's new in Workfront 2020.2 release overview" and "2020.3 release overview", and "What's new in Workfront Library" with a link to "Workfront Library release activity".

Upcoming Virtual User Groups

one.workfront.com/events

- Apr 13: Creative Agencies & Marketing: Workfront Proof
- Apr 20: Transitioning to the New Workfront Experience

Coming soon!

- *Roles & Responsibilities: Group Admins and System Admins*
- *Request and Intake Queues*
- *Training & Onboarding Users*
- *Resource Management*



Leap is now part of
Adobe Summit—The Digital
Experience Conference.

Adobe **SUMMIT**

A free virtual event April 27-28, 2021

SUMMIT

Thank you.

